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EVOLUTION OF A PVO CO-FINANCING PROGRAM: LESSONS LEARNED AT USAID/PHILIPPINES

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TABLE OF CONTENTS

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LIST OF ACRONYMS

ACDI	Agricultural Cooperative Development International
ASF	Andres Soriano Foundation, Inc.
BIR	Bureau of Internal Revenue
Co-Fi	Co-Finance
DPF	Development of People's Foundation
FEED	Foundation for Educational Evolution and Development
II	Intermediate Institution
IPHC	Institute of Primary Health Care
JSI	John Snow, Inc.
LGC	Local Government Code
LGU	Local Government Units
LPVO	Local Private Voluntary Organization
MCH	Maternal and Child Health
NACFAR	National Coalition of Fisherfolks for Aquatic Reform
NEDA	National Economic and Development Authority
NGO	Non-Governmental Organization
OFFPVC	Office of Food for Peace and Voluntary Cooperation
OGP	Office of Governance and Participation
OVC	Office of Voluntary Cooperation
PBSP	Philippine Business for Social Progress
PCPD	Philippine Center of Population and Development
PO	People's Organization
PVO	Private Voluntary Organization
RAFI	Ramon Aboitiz Foundation, Inc.
SEC	Securities and Exchange Commission
SO	Strategic Objective
SpO	Special Objective
TANGO II	Technical Assistance for the Conduct of Intergrated Family Planning and Maternal Health Activities by Philippine Non-Governmental Organizations
TSPI	Tulay sa Pag-Unlad, Inc.
USAID	United States Agency for International Development

EVOLUTION OF A PVO CO-FINANCING PROGRAM: LESSONS LEARNED AT USAID/PHILIPPINES

Executive Summary

In 1980, USAID/Philippines established a grants mechanism whereby U.S. Private Voluntary Organizations (PVOs) and local PVOs (LPVOs) could directly receive foreign assistance funds to design and implement development projects. A key feature of this program is the requirement of a 25 percent cash or in-kind match by the recipient PVO; the project is "co-financed." The Mission has funded four Co-Finance (or "Co-Fi") programs since 1980, and while each has had a different emphasis, an overall goal has been the institutional strengthening of non-governmental organizations (NGOs). The purpose of this report is to identify the lessons learned during the course of the Co-Fi program.

Co-Fi I responded to the unanswered basic needs of the country's disadvantaged populations. Co-Fi II stressed building the capacity, especially among LPVOs, to engage in more diverse development activities. Co-Fi III emphasized the role of LPVOs as intermediary institutions. Co-Fi IV, after re-engineering exercises, is dedicated to encouraging popular participation in local decision-making and strengthening democratic institutions.

Since the Co-Fi program was established, the NGO sector in the Philippines has experienced a significant transformation and is believed to be one of the most sophisticated in developing countries. The policy environment in which NGOs operate is extremely friendly: it is relatively easy to become a government-registered NGO; NGOs can engage in political lobbying without jeopardizing their tax-exempt status; and the government views NGOs as both development and governance partners. An analysis of the Philippine policy context may suggest strategic points of intervention for countries where the policy environment is more restrictive.

The experience of the Co-Fi program has produced a number of lessons learned. Co-Fi grantees benefit from stable personnel at USAID, consistency of vision, and program flexibility. Because of the technical assistance needed by PVOs, especially in financial management, Co-Fi programs require a major commitment of personnel and resources by the implementing Mission. Another area of technical assistance needed by grantees is in appropriately calculating and valuing an in-kind contribution. Although often initially resented, Mission reporting requirements help to strengthen institutions. One consequence of USAID reporting and financial requirements is that the pool of NGOs with which USAID/Philippines can directly work is limited.

The Co-Fi program supported partnerships between and among NGOs. USAID/Philippines has learned in the nearly 20 years of fostering these partnerships that takes time to develop strong partnerships. Additionally, the more equal partnerships become, the more difficult they are to manage. The Mission has partnered with Intermediate Institutions (II) which

provide funding, management oversight, and technical support to subgrantees. Just as the Mission has established guidelines choosing IIs as partners, IIs should develop sound criteria for selecting subgrantee partners. One measure of success of the II-subgrantee partnership is the ability of the subgrantee to mobilize its own resources.

The relationship between USAID/Philippines and the PVO community is characterized by intentionality. The Mission actively reaches out to the PVO community through annual partnership conferences, one-on-one meetings, and attendance at grantee activities. The Mission has also found that investment in training has pay-offs for the entire NGO sector long after a grant ends. Through Co-Fi grants, USAID/Philippines has supported the establishment of three NGO training centers that have become an important source of NGO strengthening. They have provided a means for USAID/Philippines to leverage its impact: far more NGOs can receiving training or other support services from the centers than the Mission could support on an individual basis.

The current coalition-building Co-Fi strategy suggests several important principles. First, previously established coalitions appear to be more successful than coalitions created for the purpose of seeking grant funding. Second, specific advocacy and policy goals help coalitions to be more effective. Third, coalitions require technical assistance in conflict management and consensus building. Fourth, the roles between grant recipient and implementor should be clearly delineated to avoid problems during grant activities. Fifth, coalition grants should include an institutional strengthening component.

For USAID/Philippines and the PVOs involved in the Co-Fi program, financial sustainability is a high priority. The Mission is operating in a context of decreasing resources and is concerned with PVOs continuing their development projects without USAID assistance. PVOs recognize that the donor pool is shrinking and it is necessary to find additional ways to support their activities. The Co-Fi program provides many lessons about financial sustainability. Co-Fi grantees are using a number of effective sustainability strategies. These strategies include: cost-recovery or fee for service schemes, diversification of funding sources, cross-subsidization of non-sustainable activities by profit-making endeavors, microfinance projects, activities supported by dues or memberships, individual contributions, endowments, streamlining operations, and facility rental.

Pressures, internal and external to PVOs, will continue to highlight the need for sustainability. USAID Missions should be willing to provide the technical assistance and resources necessary for grantees to pursue sound sustainability strategies. These strategies should be context-specific and developed in consultation with project customers. In order to promote sustainability throughout the NGO sector, the development of a strong indigenous philanthropic sector may be a strategic point of intervention for USAID/Philippines. Sustainability requires strong leadership within NGOs and there is a need for a second generation of NGO leaders in the Philippines to tackle this fundamental issue.

Introduction

In 1980, USAID/Philippines established a grants mechanism whereby U.S. Private Voluntary Organizations (PVOs) and local PVOs (LPVOs) could directly receive foreign assistance funds to design and implement development projects. A key feature of this program is the requirement of a 25 percent cash or in-kind match by the recipient PVO; the project is "co-financed." The Mission has funded four Co-Finance (or "Co-Fi") programs since 1980, and while each has had a different emphasis, an overall goal has been the institutional strengthening of non-governmental organizations (NGOs).[1] The purpose of this report is to identify the lessons learned during the course of the Co-Fi program. These lessons may help other Missions that want to design or strengthen a PVO co-financing program. The Program Overview will provide a brief overview of the USAID/Philippines Co-Fi program, charting the growth and changes in the program. The report will then discuss the growth of the NGO sector in the Philippines, describing both the political history of NGO evolution and the policy environment which makes the Philippines quite NGO-friendly. Background on the Co-Fi program and the NGO sector provides a context for the subsequent discussion of the lessons learned during the Co-Fi program. The report concludes with a discussion of NGO financial sustainability. While there is progress yet to be made by Philippines NGOs, Co-Fi grantees are employing a number of effective sustainability strategies.

Program Overview

In order to participate in the Co-Fi program, an organization must be registered as a PVO with USAID.[2] For LPVOs, the process includes registration with the Securities and Exchange Commission (SEC) of the Philippine government, possession of a notarized constitution and by-laws, and certification of tax-exempt status with the Bureau of Internal Revenue (BIR). The organization must also provide evidence that it is engaged in voluntary charitable or development assistance activities and is financially viable and can perform its function without USAID support. Furthermore, the organization must have three years of audited books. Registration takes approximately one month, once all necessary materials are received by the Mission. Upon registration, a PVO is eligible to respond to the Mission-issued Guidelines for Application.

[1] In this report, the acronyms U.S. PVOs and LPVOs will be used to refer to PVOs registered with USAID. The acronym NGOs will be used to refer to the larger community of Philippine non-governmental organizations, whether registered with USAID or not.

[2] U.S. PVOs must annually register with AID/Washington, while LPVOs annually register with AID/Philippines. After LPVOs receive provisional registration with AID/Philippines, the Mission provides registration information to AID/Washington for approval and formal registration.

From 1980 until late 1994, the Co-Fi program was housed in the Office of Voluntary Cooperation (OVC).[3] In 1994, as a result of re-engineering, it was moved to the Office of Governance and Participation (OGP), with programming implications that will be discussed later.

Co-Finance I Co-Finance I was in place from 1980 to 1986. USAID/Philippines made available $6.61 million for 30 grants to eight U.S. PVOs and 10 LPVOs. Grantees provided $4.24 million in matching cash and in-kind contributions to support their projects. The programmatic emphasis of Co-Fi I was on addressing the development priorities of disadvantaged sections of the Philippine population. Program activities included improving agricultural production, expanding employment opportunities, and increasing the poorest segment of the population's access to non-formal education, better sanitation, family planning and nutrition information, and legal assistance.

The Mission employed two types of grant relationship during Co-Fi I. In the first, the recipient PVO directly designed and implemented the proposed project. The second type served as an umbrella grant in which the recipient PVO made subgrants to smaller, less experienced NGOs. The grantee shared in the implementation of the project, in addition to mentoring the subgrantee in effective program management and delivery.

Co-Fi II was designed and implemented based on the recommendation of the mid-term evaluation in 1982, which concluded that PVOs had the ability to effectively implement development projects among disadvantaged communities.

Co-Finance II During the life of Co-Fi II (1984-92), USAID/Philippines made available $17.265 million for 64 grants to 12 U.S. PVOs and 24 LPVOs. Grantees provided $11.1 in matching cash and in-kind contributions to support their projects. The purpose of Co-Fi II was to "improve the socio-economic status of selected poor groups through participatory development programs and innovative, small-scale or pilot activities which [were] proposed, developed and implemented by PVOs" (USAID/Philippines, 1993). The emphasis was on building the capacity, especially among LPVOs, to engage in more diverse development activities; improving PVOs' ability to design, manage, and evaluate such activities; and targeting the rural poor as beneficiaries of development projects.

The subprojects supported during Co-Fi II were sectorally diverse including agricultural policy and development, health care delivery, family planning, integrated farm development, agro-forestry, small and micro-enterprise development, upland development, barrio water systems, jail inmate rehabilitation, and family ecological farms.

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[3] During the 1980s this office was named the Office of Food for Peace and Voluntary Cooperation (OFFPVC). The name was later shortened to OVC, with no organizational or programming change.

In addition to the two types of grant relationship employed in Co-Fi I, the Mission added a third: the Intermediate Institution (II). An II provided funding, management oversight and technical support to subgrantees, but was ***not*** involved in the actual implementation of the project. Three LPVOs served as IIs during Co-Fi II: the Foundation for Educational Evolution and Development (FEED), Philippine Business for Social Progress (PBSP), and the Ramon Aboitiz Foundation, Inc. (RAFI). The former two LPVOs had been direct implementors in Co-Fi I. RAFI, however, received it first Co-Fi grant as an II.

Co-Finance III Co-Fi III ran from 1989-96. USAID/Philippines administered $24.4 million in support of 84 projects to 16 U.S. PVOs and 32 LPVOs. Grantees provided $11.025 million in matching cash and in-kind contributions to support their projects. The goal of the project was to improve the socio-economic status of selected poor groups, including ethnic minorities, through participatory development activities. The major focus of Co-Fi III was on building the capacity of IIs to more effectively service the rural areas of the Philippines. The majority of funds went to IIs for subgranting to smaller grassroots organizations and for their own institutional development.

The use of mid-term evaluations to inform subsequent project design was a practice that was continued in Co-Fi III. Perhaps the most significant change in Co-Fi III was the increased emphasis on the use of IIs. This change was in response to a concern of the evaluation team regarding the staff workload due to the expected expansion of the Co-Fi program. The team questioned the ability of OVC's few staff to adequately support and monitor a growing number of activities. With the use of more IIs, which assumed the primary role for oversight and monitoring of less experienced NGOs, the USAID staff burden was reduced. A second design modification in Co-Fi III was the emphasis on PVO-government linkages. Many community organizations were formed during the Co-Fi grants and there was concern among the evaluation team that adequate institutional support be given to these organizations once USAID funding ended. In response, a stated purpose of Co-Fi III was to improve PVO-government linkages.

Co-Fi III grants were focused on the microenterprise development, agriculture, natural resource management, and fishing sectors. Within these sectors the grants heavily favored activities that were aimed at increasing beneficiary employment and income.

Co-Finance IV When Co-Fi IV began in 1993 it was designed to increase the amount of grant funds channeled to IIs that were financially sound. Nine LPVOs and 3 U.S. PVOs received $6.369 million to carry out 31 projects. The supported project activities included environmental conservation and rehabilitation, income and employment generation, small and microenterprise development, agro-forestry, labor education and counseling, promoting participation in governance, and community-based primary health care.

Two factors converged during the first year of Co-Fi IV that resulted in a significant shift in programming. First, the Mission revised its Strategic Objectives (SO) in the course of re-engineering[4]:

- SO 1 - Accelerating Economic Transformation of Mindanao
- SO 2 - Improved National Policies in Trade and Investment
- SO 3 - Reduced Fertility Rate and Improved Maternal and Child Health
- SO 4 - Enhanced Management of Renewable Natural Resources
- SO 5 - Reduced Emission of Green House Gasses
- SO 6 - Broadened Participation in the Formulation and Implementation of Public Policies in Selected Areas

The Co-Fi program needed to be more closely linked to a SO. Consequently, the program was revised to support SO 6. All the resources in the Co-Fi program were "dedicated to encouraging popular participation in critical local decision-making, and to the strengthening of democratic institutions" (USAID, 1994).[5]

It also became clear in late FY 1993 that resources for the co-fi program would be dramatically reduced in subsequent years. The Co-Fi staff was faced with the task of continuing their commitment to supporting PVOs' development activities with far fewer financial resources and personnel. As an office, a reinvention process took place which streamlined operations and focused the program to democracy-related activities. Later, the Mission became a Re-engineering Lab and this further refined the changes that were started during the reinvention phase. Coincidentally, two key thrusts were being pushed by the Philippine Government. The first was the Local Government Code (LGC) which, among other things, mandated the participation of NGOs in local special bodies. The second thrust was the Social Reform Agenda which placed priority on the disadvantaged basic sectors such as indigenous peoples, marginalized fisherfolk, and the urban poor. Thus, what evolved was a civil society program that aimed to open new arenas for genuine participation in the public policy process by disadvantaged groups with underrepresented interests.

The civil society program focuses on groups that remain marginalized or fall outside the context of the LGC. The civil society program also complements the Mission's governance activities as there are issues that cannot be singularly addressed by locally rooted solutions. In FY 1995, the Co-Fi program funded three coalition-building projects; three more were funded in FY 1996.

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[4]The Mission established two Special Objectives (SpO): 1) Rapid Increase of HIV/AIDS prevented; and 2) Assistance to Amerasians

[5]Co-Fi IV included a democracy focus before the programming shift, but the revised program made democracy and popular participation the core of the program.

In the coalition-building grants, a U.S. PVO or LPVO serves as the project holder; the project implementor is a national coalition, of which the project holder may or may not be a member. The 25% match that has historically been central to the Co-Fi program is still in place and the coalition partners have come up with various arrangements for meeting the match. The coalition-building projects are as diverse as previous Co-Fi portfolios and include fisherfolk advocacy for sustainable aquatic reform, enhancing people's initiatives for housing and urban development, advancing the participation of upland indigenous peoples in the Philippines democratic process, empowering women and children in the informal sector, building unity for coconut industry reform, and developing standards for the micro-finance sector.

The PVO/NGO Sector in the Philippines

Since 1980, when the Co-Fi program was established, the NGO sector in the Philippines has experienced a significant transformation and is believed to be one of the most sophisticated among middle-income countries. Countries with a nascent NGO sector or more restrictive policy environment may believe that there are few lessons to be learned from the Philippines because of its unique situation. It is important to remember, however, that the Philippine NGO community was not always as it is today. In 1983, few in the Philippines could have predicted the change in national government or the growth of NGOs. However, change may come at any time and the benefit of the Philippine Mission's nearly two decades of experience with co-financing LPVOs may help prepare other Missions to promote and/or manage change they may experience in the future. The USAID/Philippines experience may also suggest strategic points of intervention in the policy arena to countries with restrictions on the activities of NGOs.

<u>Political history and context</u> Just as the late 1960s and early 70s was a time of protest in the West, political upheaval struck the Philippines. During this time peasant groups and the Catholic Church engaged in community organizing; although generally not existing as formal NGOs, Church-based organizations mobilized for social, economic, and political change while peasant and farmers groups moved for agrarian reform. A core group of activists and organizers emerged from this era.

The imposition of martial law by President Marcos in 1972 ushered in a new phase of NGO development, a period characterized by diversity and innovation. Activists and people's organizations (POs)[6] formed through earlier organizing were the targets of repression, serving to unify the sector. People and NGOs set aside the ideological differences that had often separated them and tried to reclaim democratic space. Some argue that the development of NGOs during

[6] People's organizations are "grassroots organizations such as urban poor associations, peasant associations, labor unions and other community or sector-based coalitions. They are usually the direct beneficiaries of NGO services" (Aldaba, 1994).

this period was due to attacks on POs (Lopa, 1995). Rural members of POs, bearing the brunt of martial law, formed NGOs as a source of protection.

In August, 1983 Benigno Aquino, a major opposition figure, was assassinated. This event served to politicize organizations and individuals. Development NGOs who had tried to sit out the political fray of martial law found themselves drawn into political formations, demonstrations, and expression. Due to increased militarization, NGOs and coalitions were again looked to as a source of protection. Marcos called for snap elections to be held in early 1986. During the three months preceding the elections, NGOs advocated for election reform and eventually played a role in the People's Power Revolution and the election and installation of Cory Aquino as President.

In this first generation of the sector, Philippine NGOs were often centered around charismatic individuals, cause-oriented, and politically affiliated. The staff were often volunteers and little attention was given to organizational development or sustainability. As the Marcos administration deteriorated, the government was less able to provide needed services. The NGOs were seen as a conduit of service provision where the government had failed. This expectation continued during the Aquino presidency and contributed to the expansion of the NGO sector during the 80s.

NGOs proliferated during Aquino's presidency as greater resources were channeled to them from the government and external donors. They were faced with the challenge of following through on the promises of the revolution. NGOs increasingly professionalized during this period and expanded to more sectors and engaged in more diverse activities. The democratic space widened under the Aquino presidency and more NGOs were able to work with each other and with government entities as the politicization of NGOs decreased.[7] The new Constitution recognized NGOs as development partners and President Aquino used a fund dedicated to social development to channel money to NGOs. All these factors combined to lend credibility to the NGO sector and infuse NGOs with funds so that they could expand their activities.

There are currently approximately 30,000 NGOs registered with the SEC, approximately 5,000 of which engage in development work (Aldaba, 1994). NGOs in the Philippines can be classified by the type of activities performed (e.g., community organizing, research and advocacy), scope of operation (e.g., urban, rural), sectoral focus (e.g., health, agriculture, urban development), ideological/political orientation (e.g., leftist, moderate, conservative), and parentage (e.g., church, government, business).

There are a number of challenges currently facing the NGO community including movement towards financial sustainability, the further professionalization of the sector,

[7] NGOs were viewed with great suspicion during the Marcos years. NGOs were believed to conceal communists and subversives. This did not completely abate during the Aquino years, especially as the war with the New People's Army and separatists groups in Mindanao heightened, but the suspicion did lessen.

articulating the impact of globalization on constituents, nurturing partnerships, and enhancing the technical capacity of organizations. Perhaps the most significant opportunity facing NGOs is the devolution of power, services, and resources from the national government to the Local Government Units (LGUs). Under President Ramos, a program of decentralization has been instituted. LGUs have increasing responsibility for the delivery of services as financial resources are being transferred from the national government to LGUs. NGOs are now exploring ways to partner with LGUs and may be able to access these funds if 1) they are able to successfully participate in the decision-making process; and 2) *barangay*[8] development plans adequately represent the community's social development concerns. Therefore, NGOs need to be willing to partner with government entities, enhance people's participation in local decision making, and build the capacity of LGUs.

Policy Environment The policy environment in which NGOs operate is extremely friendly. It is relatively easy to become a registered NGO with the SEC. And unlike non-profit organizations in the U.S., NGOs in the Philippines can engage in political lobbying and advocacy without jeopardizing their tax-exempt status. This dimension of NGO life is what permits USAID/Philippines to support the current coalition-building grants, whose explicit goal is advocacy and policy reform.[9]

Unlike in some countries, the Philippine government does not have a formal approval process of USAID-funded PVO projects. USAID/Philippines has an agreement with the National Economic and Development Authority (NEDA) that, rather than secure formal approval, PVOs should develop projects "in consultation with" NEDA regional offices. The regional offices are given 30 days upon submission of a proposal to make comments and/or recommendations. If no comments are received, the proposal is assumed to be satisfactory.

Finally, government ministries recognize the important role that PVOs/NGOs have to play in representing the needs of and delivering services to remote populations. The national government has sought to more fully incorporate PVOs/NGOs into the development process. Similarly, the Philippine government expects NGOs to be involved in the government process. Twenty percent of seats on LGU councils are reserved for NGOs and the private sector.

These factors, combined with the constitutional recognition of NGOs, serve to create a large space in which NGOs are free to operate. An analysis of the Philippine policy context may also suggest strategic points of intervention for countries where the policy environment is more restricted; for example, reducing bureaucratic and government barriers to NGO registration,

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[8]The barangay is the basic administrative unit in Philippine government.

[9]U.S. PVOs who act as project holders in the coalition-building grants express some concern about this issue. Although the U.S. PVO does not itself engage in political advocacy, it does support the local coalition's advocacy efforts.

reducing limits on advocacy by NGOs, promoting partnership with both top level national government ministries and local government units. This openness is clearly predicated, however, on the democratization that occurred so dramatically in 1986.

Lessons Learned

The experience of the Co-Fi program has produced a number of lessons learned. These lessons are not offered as a blueprint by which other Missions should design a co-financing program. Each context is unique: NGO sectors vary in strength and maturity, financial and staffing resources fluctuate, and cultural mores dictate forms of appropriate community participation. These lessons are presented as general themes to be considered in the development and strengthening of the NGO sector through a co-financing grant program.

Programming

- For eight years, from 1984-92, the Chief of OVC (which housed the Co-Fi program) was the same individual. This provided an uncommon degree of ***stability and consistency*** in the program. Grantees often refer to this stability when asked about their attributions for project success and institutional strengthening. Although this program component would be difficult, if not impossible, to replicate, it does suggest that a shared, consistent vision is important for the success of a PVO grant program.

The stability of personnel, especially at the Chief level, guaranteed there was a ***logical flow in programming***. The Co-Fi programs were not characterized by disparate, unconnected emphases as personnel came and left, promoting their various viewpoints. If a Co-Financing Program team is committed to a particular strategy of PVO strengthening, this may allow a program to survive the personnel changes that generally characterize the activities of USAID.

- The emphasis of the Co-Fi program has been on strengthening PVOs, not improving programming in certain sectors. Because of this, grantees were able to expand their activities into new areas. For example, an organization focused on primary health care could incorporate a microcredit scheme into its activities. The program has been, therefore, characterized by ***flexibility***. Historically, grantees were allowed a great degree of flexibility as long as they achieved results. Grantees appreciated this trust and USAID/Philippines found it to be an important factor in strengthening the NGO sector.

Assistance

- More than any other form of assistance, grantees want and appreciate Mission assistance in financial management. LPVOs, other than those with close ties to the corporate sector, usually need significant assistance in installing and maintaining appropriate financial and fiscal monitoring systems. This requires a ***commitment of personnel and resources*** by USAID/Philippines. At the peak of the program, 12 Co-Fi staff managed 86 grants. Other Mission personnel were also called on to support the Co-Fi grantees; for example, members of the Office of Financial Management made site visits to assist grantees.[10]

Most Missions do not currently have the resources to implement a program of this magnitude. There are several options for dealing with these resource constraints. One, implement a smaller program; many countries do not have an NGO sector mature enough to do co-financing on a grand scale. Two, if the country has a mature foundation community, target corporate foundations as implementers. Because of their parentage, corporate foundations often have strong financial systems in place. If these systems are not in place, assistance can often be accessed from the corporation rather than relying solely on Mission staff. Three, initially target experienced U.S. PVOs as grantees or IIs; they could have the responsibility to provide the majority of assistance to subgrantees. Four, contract out the management of the program through an umbrella agreement.

- Although grantees often resent them at first, ***reporting requirements help to strengthen organizations***. PVOs tend to initially find the requirements burdensome, though all acknowledge that requirements have lessened as a result of re-engineering. In time, however, and with appropriate Mission assistance they appreciate the discipline the requirements impose on their organization. They evolve from being a burden to a tool used in project management. Many grantees report using similar systems in non-USAID projects. Furthermore, they find it useful to train their subgrantees in the application of such requirements.[11]

- Subgrantees nearly always contribute toward the 25% match requirement of the Co-Fi program, usually through in-kind contributions. ***PVOs could benefit from assistance in appropriately calculating and valuing an in-kind contributions.*** Co-Fi staff have reported "missed opportunities" in proposals that did not fully capture contributions like volunteer time.

__Partnerships__

- ***It takes time to develop strong partnerships*** and the more dissimilar the actors the more time is required to nurture partnerships. The grant period should take this into account. Typically, Co-Fi grants are for one to three years. Often this is enough time for project implementation. In projects that involve community organizing or when a grantee is new in a

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[10]For many years, USAID/Philippines hired a local contractor to provide the one-on-one financial management assistance to grantees. This continuity was important to the effectiveness of the assistance and in reducing the workload of Mission staff.

[11]The issue of reporting requirements is not examined in detail in this report. Further study is needed to identify the kinds of requirements that are most helpful to PVOs.

community, however, it may be necessary to spend considerable time building trust in the community. One corporate foundation that implemented an agricultural project among upland farmers in the Visayas had to spend the first six months of the grant period building credibility and trust. The communities were cautious because of the presence of both leftist and government forces in the area and needed to be assured of the foundation's non-involvement with armed groups. This was not anticipated in the grant implementation plan and, consequently, the project fell behind schedule. The Mission believes strongly that a three-year time frame imposes necessary discipline in project implementation and encourages phase-out plans at the project design stage. Only in exceptional cases are one-year extensions granted.

- The Co-Fi program has produced several different types of partnerships: a direct implementor forming informal partnerships with POs; an II with subgrantees; and partners in the coalition-building grants. These types represent a continuum of equality in partnering relationships. As a rule, the direct implementor/PO relationships are highly unequal with the implementor possessing power and control as a resource holder. The II/subgrantee relationship moves closer to equality: the subgrantee has the responsibility for project implementation, but the II still plays a significant role in mentoring and monitoring. Coalition partners, on the other hand, have the expectation of full partnership and, indeed, problems can develop when one partner acts in a way that is perceived to violate full and equal partnership. ***There is an evolution in the equality of partnerships and as partners become more equal the partnerships become more difficult to manage.***

This evolution of partnership equality suggests that Missions can design grant mechanisms that progressively support more equal partnerships. PVO grants programs should not simply be seen as a means to strengthen sectoral expertise or institutional capacity. Rather, they can be a means to foster strong partnerships within and among the PVO/NGO community.[12]

- An II has sole responsibility for subproject management, implementation, and reporting. An II's responsibilities include overall financial management and accountability of subgrantees; provision of necessary training to subgrantees; and conflict management and resolution with subgrantees. Given the high degree of responsibility shouldered and based on experience, several IIs chose to work with NGOs and POs that had a track record. This reduced the risk and administrative burden borne by the II and led to more successful project implementation. ***Intermediate institutions should be encouraged to develop sound criteria for selecting subgrantee partners.*** When USAID/Philippines established the II strategy, the Co-Fi staff approved grantee-subgrantee agreements. As grantees became more experienced in their role as IIs, the staff reduced their involvement in the decision.

[12]This should not suggest that, in an effort to promote equal partnerships, a coalition-building grant program should be instituted in a nascent NGO sector. The coalition-building approach is possible in the Philippines because of the relative maturity and sophistication of the NGO sector.

- Several IIs report that a portion of their subgrantees were strengthened to the degree of being able to mobilize their own resources, although not necessarily USAID funds. This is important for both the sustainability of individual organizations and the development of the NGO sector at-large. ***Performance indicators used for project monitoring should explicitly focus on a subgrantee's ability to mobilize resources.*** This is an indication of both the subgrantee's organizational capacity and the II's strength as a mentor.

Mission - NGO Sector Relationship

- ***The stringent reporting requirements and the 25% required match restricts the pool of NGOs with which USAID/Philippines is able to work.*** The pool of potential grantees is skewed toward the more mature, sophisticated, and capable NGOs. This is not necessarily a problem. In fact, by utilizing an II strategy, the Mission may have been able to indirectly interact with a group of NGOs that it could not normally support. It is not clear if there are financial or programmatic advantages/disadvantages to working with this smaller pool of NGOs. Similarly, it is possible that there are NGOs that have unique capacities, with which USAID/Philippines would like to work, but are unable to meet the match requirement. These are issues in need of further study. This lesson is offered simply as a reminder that choices have consequences. Missions developing or expanding a Co-Fi program should consider the implications that requirements have for the NGO community: which NGOs become development partners, which NGOs get strengthened, and which political blocs receive support.

- ***The relationship between USAID/Philippines and the PVO community is characterized by intentionality.*** The Mission actively reaches out to the PVO community through several different mechanisms. Each year, the Mission holds a partnership conference that plays an important role in renewing and redefining relationships between USAID and PVOs each year. It is an opportunity for consultation, information dissemination, and networking. In addition to this large, annual event, the OGP staff periodically meet one-on-one with PVOs for the purpose of consultation. PVO representatives also praise the willingness of OGP staff to leave the Mission and attend grantee activities.

- ***Investment in training has pay-offs for the sector long after a grant ends.*** Through Co-Fi grants, USAID/Philippines has supported the establishment of NGO training centers in Manila, Cebu City, and Davao City. These centers have become an important source of NGO strengthening and provide several important benefits to both the Mission and the NGO sector. First, the PVOs that run the centers have significantly increased their capacity to provide training to other PVOs and NGOs; they are recognized as leaders in this arena. Second, the centers provide an important revenue stream for the PVOs.[13] Third, because the centers are located in three different regions of the country, it is not necessary for NGO representatives to

[13] This is discussed in more detail in the section "Options for Sustainable Activities."

make the long trip to Manila to receive quality training. This has helped reduce the capital city bias that, in an era of shrinking resources, can unintentionally creep into NGO strengthening initiatives. Finally, the training centers have allowed USAID/Philippines to leverage its impact: far more NGOs can receiving training or other support services from the centers than the Mission could support on an individual basis.

Coalitions

- ***Previously established coalitions appear to be more successful.*** Of the six coalition-building grants in the current portfolio, some coalitions had been in existence long before they received a Co-Fi grant and other coalitions formed for the purpose of receiving grant money. While not true in every case, those coalitions that had a history of successfully working together have been better able to weather the problems that inevitably arise in the course of coalition work. For example, Agricultural Cooperative Development International (ACDI) is partnered with the National Coalition of Fisherfolks for Aquatic Reform (NACFAR) in a coalition-building grant that began in FY 95. NACFAR was established in 1990 and had successfully worked with both local and national government entities before the commencement of the grant. NACFAR had internal leadership structures in place and a tested consensus-building and decision-making process. Coalition participants were clear about their roles at the start of the grant and the grant activities are an outgrowth of NACFAR's previous work rather than an entirely new endeavor.

Co-Fi program requirements do not mandate that coalitions must have a track record. Experience to date does not suggest that such a requirement is necessary or advisable.[14] Other Missions may want to carefully consider, however, the preference given to experienced vs. first-time coalitions. USAID/Philippines' experience suggests that for first-time coalitions, it may be helpful to 1) have consensus building and decision making structures in place within the coalition; 2) have a coalition secretariat or representational body take the lead in project implementation rather than one NGO who is a coalition member assume that responsibility; and 3) recognize that decision making by consensus and/or unanimity does not necessarily lead to better decisions but does ensure buy-in from all participating members.

- ***Specific advocacy and policy goals help coalitions to be more effective.*** Just as is true with more traditional development projects, a focused coalition is more likely to be successful. Coalitions should be encouraged to focus on one or two major issues around which to develop an advocacy campaign. This should be complemented by research that supports the advocacy objectives. This builds the capacity of the coalition to have factually-supported advocacy efforts, allowing them to enter the democratic space on equal footing with other interest groups.

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[14] In fact, a coalition that is having good success to date is a tactical coalition that formed for the express purpose of the grant to develop and advocate for uniform microfinance standards among industry practitioners.

- There is a long history of coalition work among Philippine NGOs, particularly working in coalition politics (Cala & Gargeda, 1994). But coalitions have been plagued by splits over ideological differences, personalities, and strategy. These are not unique challenges to Philippine coalitions, but are issues for coalitions everywhere. However, the past political landscape, characterized by charismatic leaders and strong political affiliations, still exerts a potent influence on Philippine NGOs today and are the basis for seemingly insurmountable obstacles as they engage in coalition work. ***Coalitions require technical assistance in conflict management and consensus building.*** Missions should consider providing training in these areas, especially for newer coalitions. In the Philippines there is local expertise that can be brought in, people who have experience in NGO coalitions, training, and coalition politics. Local expertise may not always be available, in which case a Mission should be prepared to bring in outside consultants to provide training and consultation.

- ***The roles between the project holder (grant recipient) and implementor should be clearly delineated.*** Many coalitions in the Philippines make decisions based on consensus: if consensus is not reached then action is not taken. The delineation of roles and tasks between the two parties is critical. The project holder is usually a U.S. or Philippine PVO or corporate foundation while the implementor is usually a grassroots-based peoples organization. These parties do have inherently different organizational cultures and management styles. The grant may impose a time line for action that is unfamiliar or uncomfortable for the coalition members. Consequently, tension can erupt between the project holder, who is responsible to USAID/Philippines, and the implementing coalition.

Furthermore, the current grant program exists to influence policy. A consensus approach and geographically dispersed coalition membership are often not conducive to the rapid response required in the policy and governance arena. Careful thought at the beginning of the project may help coalitions to navigate the problems that arise. Coalitions should be encouraged to develop guidelines for dealing with these situations. These guidelines should be developed by and within the coalitions. The respective roles of project participants should be articulated from the start. Experience does not suggest that there is a "one-size-fits-all" solution to this issue or that guidelines and responsibilities should be defined by the USAID Mission.

- ***Coalition grants should include an institutional strengthening component.*** Just as the earlier iterations of the Co-Fi program were explicitly focused on institutional strengthening, so should the coalition-building grants. The coalitions are expressing the need and desire for capacity building; such strengthening would contribute to both organizational and financial sustainability.

Financial Sustainability

For USAID/Philippines and the PVOs involved in the Co-Fi program, financial sustainability is a high priority. The Mission is operating in a context of decreasing resources and is concerned with PVOs continuing their development projects without USAID assistance. PVOs recognize that the donor pool is shrinking and it is necessary to find additional ways to support their activities. As mentioned earlier, the Government of the Philippines increasingly views PVOs/NGOs as channels for service delivery. As these expectations increase it is important for PVOs/NGOs to find additional means of mobilizing resources. The Co-Fi program provides many lessons about financial sustainability.

There are two common misconceptions about financial sustainability shared by PVOs in the Co-Fi program. The first is that sustainability means self-sufficiency. In some cases, an organization's goal should be self-sufficiency. For example, microfinance projects have built in cost-recovery mechanisms and full self-sufficiency should be a long-term goal. However, self-sufficiency may not always be appropriate or possible. Some donors in the Philippines argue that certain sectors have more difficulty than others vis a vis sustainability. The environment sector, because of the significant front-loading of resources and long pay-off schedule, is one example. In such cases, movement towards sustainability may mean a diversification of the donor base or streamlining operations to reduce operating expenses.

The second common misconception is that the only mechanism of sustainability is cost-recovery. PVOs do not seem to be considering and/or employing the full complement of potential sustainability mechanisms. This report will articulate nine working models of sustainability that PVOs are using.

As both internal and external factors push PVOs to implement sustainability measures, some are making trade-offs between their development work and sustainability. In order to implement cost-recovery mechanisms, PVOs may shift their focus from the traditional, very low-income customer to the low-middle or middle class customer. John Snow, Inc. (JSI) uses a fee-for-service approach in midwife owned-clinics.[15] They have consciously chosen to target higher income clients who can pay for family planning and maternal and child health services. The lowest income households in the service area are expected to utilize free government services. While there is nothing inherently problematic with this choice, it does reinforce the point made earlier that every choice has a consequence.

[15]JSI administers a contract from the Office of Population, Health and Nutrition (OPHN) in USAID/Philippines. Although it is not part of the Co-Fi program, its work on financial sustainability is of interest to this discussion.

Options for Sustainable Activities

- *Cost-recovery/Fee for Service*

One means of reducing reliance on donor funds is charging a fee for services provided or implementing other cost recovery mechanisms. This approach is common among Co-Fi grantees and other NGOs concerned with financial sustainability. As mentioned above, JSI is currently implementing the Technical Assistance for the Conduct of Integrated Family Planning and Maternal Health Activities by Philippine Non-governmental Organization (TANGO II). The goal of the project is to increase the availability of family planning services in the private sector by significantly expanding the number of midwife-owned clinics that provide family planning and basic maternal health services. NGOs open midwife-owned clinic franchises that charge for family planning and maternal and child health (MCH) services. The franchise clinics are expected to be self-sufficient by the end of the third year of operation. In the course of the project, several lessons have been learned. The clinics found that it was necessary to include MCH services in order to break even; family planning services alone were not adequate. They have also found it necessary to experiment with appropriate fee levels. The NGOs involved in TANGO II are mature, with a significant degree of organizational and institutional capacity. This is some question among program implementors as to whether a similar program would be successful among more fledgling NGOs.

The Philippine Center of Population and Development (PCPD) is a Co-Fi grantee using a fee for service approach in a community health program. The project goal is to strengthen communities to participate in and manage their own health programs. Volunteer health workers charge patients enough to cover their materials (i.e., cost of bandages) and are able to recoup the vast majority of costs. In a pilot program[16] whose focus is secondary care, a fee is paid by a community health organization to support a doctor who makes regular visits to the community. The health organization members can see the doctor for free as many times as they need. Non-members pay a small fee per visit. The community organization decides how to collect the fee and what system works best for them. For example, some members may pay the annual amount during the harvest season while others pay monthly. On a community-wide basis, the fee is affordable for the participating families: approximately 10 pesos[17] a month. PCPD's experience in this pilot program suggests that a decision-making structure is critical to sustainability. As issues or problems arise in a project, an effective structure must be in place to address the questions. Additionally, sustainability **must** begin with the community, it cannot be imposed top-down. Cost-recovery or fee for service strategies may not be considered feasible by people outside a community, yet a community is often willing and able to pay for services it perceives as important.

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[16] This program is not funded by a Co-Fi grant.

[17] The equivalent of US$ .38.

Another means of cost-recovery is through the sale of a product. The Ayala Foundation became involved in the Co-Fi in the early 90s when they started a three-year program to help coconut farmer cooperatives expand their product line and increase sales. At the end of the grant, three of the five cooperatives were breaking even or making a profit. Simply having a product to sell, however, does not guarantee successful cost-recovery. Ayala found that it was difficult for the cooperatives to graduate from a farmers cooperative that markets raw product to one that processes materials and markets finished products like coconut soap and oil. The leaders of the cooperatives did not easily acquire the management expertise necessary to make this shift. The co-ops may have benefitted from an outside expert to provide technical assistance on issues like pricing and product mix.

Some NGOs may be resistant to these kinds of entrepreneurial approaches because of an historic opposition to business. For those that have a product to sell, this option is worth considering. To be successful, ties to businesses are often required and because of NGOs resistance to the private sector, this can be problematic.

- ***Diversification of funding sources***

A second option for financial sustainability is for NGOs to diversify their funding sources. The funding portfolios of some USAID-funded PVOs are dominated by USAID funding and as these resources dwindle, PVOs may find their operations threatened. Therefore, it is important to maintain a diverse funding portfolio. This includes seeking funding from multiple bi- and multi-lateral donors, in addition to corporate funding. This is a strategy being employed even among grant-making foundations with endowments. The Ayala Foundation, for example, has as its goal to receive 50% of its funds from its endowment and 50% from external funds. Similarly, RAFI, although it is an endowed foundation, has expanded its funding base to include bilateral support from Australia (AusAID) and Germany (GTZ) in addition to successfully bidding for local government contracts.

- ***Cross-subsidization***

This approach uses a fee for service strategy, usually targeting higher income clients, and uses any profits to subsidize services to lower income clients who may not be able to pay the full fee. The Andres Soriano Foundation (ASF) is using this strategy in a housing program. ASF's local partner re-pays an initial grant with customer payments on affordable housing units. The payments are put into a revolving loan fund that the partner can access for other social development activities that the Foundation would not otherwise be able to support.

Another example of cross-subsidization is the USAID-funded Training Resource Center in Cebu City run by RAFI. The Center can be used by NGOs, the public sector, or corporations for their own training sessions and meetings or to participate in training that RAFI offers. A socialized fee schedule is employed so that the private sector pays more than the public sector or NGOs; the profits are used to subsidize other activities of the Center. Institute of Primary Health Care (IPHC) uses a similar approach with its Training Resource Center in Davao City.

- ***Microfinance Programs***

One reason microfinance programs are appealing is because, if implemented correctly, they have built-in sustainability components. Tulay sa Pag-Unlad, Inc. (TSPI) is one of the premier microfinance NGOs in the Philippines. It has received several Co-Fi grants and currently has a coalition-building grant. It administers two loan programs: a Grameen model program and a program that grants larger loans to tricycle driver/owner-operators. The banks that follow the Grameen model take approximately five years to reach operational viability (1500 clients at an interest rate of 5%/month) and between seven and eight years to reach full self-sufficiency. The second loan program that grants larger, sectorally focused loans achieved viability in approximately 18 months.

TSPI's and others' experience with microfinance suggest several important components of microfinance programs. First, programs must be committed to sustainability. Of the approximately 500 microcredit/finance NGOs in the Philippines, less than 50 are currently covering their costs due, in part, to a lack of commitment to self-sufficiency. Second, programs need a large client base. TSPI's Grameen-model banks can only achieve viability if they have at least 1500 clients. Third, the presence of subsidized credit harms the efforts of sustainability-oriented credit programs. Subsidized credit programs will never reach self-sufficiency because they charge below-market interest rates. It is difficult for other programs to compete with these rates when it is necessary to charge above-market interest rates to cover costs.

Some NGOs have looked toward microcredit programs to support health or education interventions. This should be approached with caution. There is some evidence that suggests clients access health or education services as means to gain access to credit, not because of the need for other services. An NGO needs to be very focused and very good at what it does in microfinance before moving into other sectors. It is possible to do multi-sectoral programming, but it should be a very mature *microfinance* institution that undertakes it, rather than a health or education institution undertaking microfinance.

- ***Dues/Membership***

This approach is not widely used by Philippine PVOs/NGOs, but a few groups are beginning to experiment with it. The Ayala Foundation has a library, the costs of which are covered by membership dues. While this approach is adequate, it has not yet generated significant funds. Traditionally, giving in the Philippines is a personal act and membership in an institution is not perceived as personal. As an organization establishes a track record, dues and membership payments may be able to make up a larger portion of an NGOs portfolio.

The current recipients of the coalition-building grants may, in the future, be able to more effectively utilize a dues scheme to contribute to the coalitions' sustainability. The coalition members do not generally pay dues and the coalition leaders recognize that financial sustainability is an issue that needs to be addressed. Because coalition members are or represent disadvantaged groups, it has been difficult for them to rationalize the charging of dues. As the socio-economic status of their members' improves, the coalitions see dues as a viable option.

- ***Individual Contributions***

At this point in time, few Philippine NGOs pursue small, individual contributions through direct mail, phone solicitation or other fundraising techniques common among U.S. non-profit organizations. One explanation for this is cultural patterns of philanthropy in the Philippines. Personal giving is traditionally directed to the Catholic Church and to schools. Giving to other institutions is often influenced by the stature and respect of key people in the organization and a long track record of activity. Furthermore, many traditional fundraising techniques may appear to be difficult to implement in developing countries. A phone solicitation campaign may not appear to be feasible in a country like the Philippines that has 38.6 people per telephone.[18] Therefore, in many NGO leaders' estimation, traditional fundraising activities used in developed countries have less chance of success.

This perception may be changing. The Asia Foundation houses the Secretariat of the Asia Pacific Philanthropy Consortium which exists to strengthen philanthropy in Asia. In the near future, the Consortium will be holding a week-long training for NGO development officers. The course will focus on strengthening fundraising techniques, focusing on individual contributions. Anecdotal evidence suggests that some fundraising techniques may have a greater rate of return in developing countries than in developed countries. While direct mail campaigns in the U.S. may have a 1% rate of return, some direct mail campaigns in Asia have achieved a 4 or 5% rate of return.

- ***Endowments***

Many of the foundations that have been Co-Fi grantees, and exist as both grant-making institutions and project implementors, operate through an endowment including RAFI, the Ayala Foundation, and PCPD. Endowments tend to reduce organizational concerns with other strategies of sustainability. While these grantees do not rely solely on the endowment they could continue to operate without external funds. Some NGO leaders in the Philippines believe that many NGOs view endowments as the best answer to sustainability and caution against this attitudes. An endowment, in the unlikely event one is made available, should only be one of several strategies that NGOs use in the pursuit of financial sustainability.

[18]The third highest rate in Southeast Asia, behind Cambodia and Laos.

- ***Streamlining Operations***

This is a prosaic, but important, sustainability strategy. The Development of People's Foundation (DPF) recycles and reuses materials as a conscious effort to cut costs. In another vein, there is some concern in the NGO community about the practice of maintaining project staff after project funding has ended. It is important for the long-term financial health of institutions that administrative discipline be practiced.

Related to streamlining operations is the importance of focusing operations. An NGO must develop a vision and develop operations that support the vision. Financial sustainability is difficult to achieve when an organization's focus is diffuse. As NGOs establish sound financial sustainability plans, they need to examine everything that drains resources from the organization. For example, an NGO may not be in the habit of counting core staff time as a cost to the organization. If the staff time is not counted then strategies to cover that cost cannot be developed.

- ***Facility Rental***

Several Co-Fi grantees have found that renting out unused facility space is a beneficial means of generating organizational income. This is a strategy that is perhaps more suited to larger NGOs that may have more space to spare, but NGOs of any size should consider how resources already in hand can be used to generate further income.

Future Directions of Financial Sustainability

- ***Technical Assistance***

Philippine PVOs/NGOs are employing a variety of techniques to ensure the financial sustainability of their organizations. Pressures, both within and without, will continue to highlight the need for sustainability. And despite the efforts underway in sustainability, NGOs express the need and desire for further technical assistance in this area. There is a perception among some NGOs that USAID preaches sustainability without providing accompanying information and support.

- ***Resource Commitment***

In a similar vein, several NGOs who are more experienced in financial sustainability comment that sustainable projects often require greater front-loading of resources and planning. Therefore, if Missions advocate sustainability, they should be willing to commit the necessary inputs.

- ***Indigenous Philanthropy***

The Philippine economic scene has long been dominated by a small group of powerful families who have a rich tradition of philanthropy through both corporate and family foundations. There is some concern that as the number of wealthy players increases this tradition may be lost. The Executive Director of one corporate foundation mentioned that after the family sold off parts of the corporation the new owners did not want to continue providing one percent of pre-tax profits to charity. Recently, several corporate foundations formed the League of Corporate Foundations to increase corporate responsibility among businesses in the Philippines. Supporting local efforts to develop a strong philanthropic movement may be a strategic point of intervention for USAID/Philippines.

- ***Context-Specific Sustainability Plans***

Many NGO leaders express concern about rigid time lines in which projects are expected to become self-sufficient. This may be natural resistance to a necessary attitudinal shift. It may also, however, suggest a more fundamental concern with top-down, external sustainability plans that show little sensitivity to project-specific issues. Sustainability plans should be formed in consultation with the project customers and be appropriate for the sector and project strategies.

- ***Second-Generation Leaders***

Finally, sustainability -- financial and institutional -- requires strong leadership within NGOs. There is a need in the Philippines to train a second cadre of NGO leaders. The leaders that came of age in the Marcos/Aquino era are preparing to pass the baton to new ones. For the good of the NGO community at-large, a new generation, committed to institutional and financial sustainability, needs to be developed.

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